



Welfare Peer Technical Assistance Network
BUILDING ASSETS FOR VIRGINIA:
USING TAX CREDITS TO SUPPORT FAMILIES
Courtyard Charlottesville - University Medical Center
Charlottesville, VA
July 14-15, 2005



July 14, 2005

8:30 – 10:00 AM

Registration

10:00 – 10:15 AM

Welcome and Introductions

Honorable David E. Brown, Mayor, Charlottesville, VA
Anthony Conyers, Jr., Commissioner, Virginia Department of Social Services
Jane M. Conroy, Executive Director, Virginia Community Action Partnership
John Horejsi, Federal Project Officer, Welfare Peer TA Network, Office of Family Assistance, Administration for Children and Families

10:15 – 11:15 AM

A Shared Vision for Community Economic Empowerment

Grant E. Collins, III, Deputy Director, Office of Family Assistance, Administration for Children and Families
Anthony Conyers, Jr., Commissioner, Virginia Department of Social Services
David Cunningham, Consultant, EITC and Self-Sufficiency Initiatives, Office of Family Assistance, Administration for Children and Families

Participation of former TANF clients in the EITC and CTC programs are important elements for building financial self-sufficiency. In Virginia, it is estimated that 22 percent of those eligible do not claim the credit. Research reveals that current and former TANF clients are less likely to participate in these programs and that minorities are less likely to receive these program benefits. This presentation will focus on the special benefits of a vigorous and effective EITC campaign.

11:15 – 11:30 AM

Break

11:30 – 12:30 PM

Partnerships in Outreach and Collaboration on the EITC New Resources for Rural Communities

Michael McBride, Chief, Educational Institutions and Government Partnerships, IRS
Nancy Lynch, Territory Manager, IRS Stakeholder, Partnerships, Education and Communication (SPEC) Office

The power of coalitions is a driving force in all communities. The IRS Territory Office, through the SPEC organization, provides critical support to communities engaged in EITC outreach initiatives. SPEC partners with communities and businesses in developing and implementing community-based partnerships to promote education, and awareness of Federal tax credits, free tax preparation services, and asset building opportunities. This session will share highlights on the program's mission, goals and operational support for local initiatives.

12:30 – 2:15 PM

EITC Coalition Recognition—Best Practices Underway in Virginia

Moderator: Carolyn Spohrer, EITC Project Manager, Virginia Community Action Partnership

During the noontime working session, VACAP will introduce the community-based partners throughout the State who are and have been instrumental in creating working coalitions. The various efforts will highlight both their successes and challenges to implementing their programs.

2:15 – 2:30 PM

Break

2:30 – 3:30 PM

Sustaining Your EITC Initiative and Effective Marketing

Steve Norris, Director, WorkSource Career Center

During this session, participants will learn about the Real Sense Prosperity Campaign, a very strong EITC community-based model underway in Florida. Ms. Norris will provide information about how to organize and network in the community to successfully bring in unique resources and effectively partner with media in the campaign to champion the EITC outreach efforts.

3:30 – 4:30 PM

The Importance of Marketing and Branding in Virginia

Moderator: Kathy Glazer, Public Relations Manager, Virginia Department of Social Services

Following a brief presentation, Roundtable participants will engage in a facilitated discussion around the importance of marketing the EITC initiative in Virginia. Topics for discussion include innovative marketing strategies and the potential value of a common brand for the State.

4:30 – 4:45 PM

Day 1 Wrap Up

David Cunningham, Consultant, EITC and Self-Sufficiency Initiatives, Office of Family Assistance, Administration for Children and Families

July 15, 2005

8:30 – 9:15 AM

Community Coalition Networking

9:15 – 9:45 AM

Key Issues for the Day

David Cunningham, Consultant, EITC and Self-Sufficiency Initiatives, Office of Family Assistance, Administration for Children and Families

This session will provide participants an opportunity to reflect on Day 1 and formulate critical questions for presenters on Day 2.

9:45 – 11:30 AM

Concurrent Workshops

A Group

Developing a Mobile Multi-Community Outreach Project

Candy Watson, Special Projects, Northeast Oklahoma Community Action Agency

Providing tax assistance to rural communities can be a challenge. This workshop will share information on strategies for developing and managing a Mobile Multi-Community Tax Filing Assistance Program. A question and answer session will follow the presentation.

B Group

An Introduction to TaxWise

Moderator: Michael McBride, Chief, Educational Institutions and Government Partnerships, IRS

Kim Manual, National Account Manager, Universal Tax System

This session will include an overview of the IRS' TaxWise software and online income tax filing process.

At 10:30 AM, the Groups will switch and attend the opposite session.

11:30 – 11:45 AM

Break

11:45 – 12:30 PM

Strategies for Empowering Communities in Accessing Resources to Support EITC Programs

Jackie Lynn Coleman, Center for Economic Progress, Chicago, IL

This session will address various approaches for providing EITC campaigns with financial sustainability and developing resources that promote asset building initiatives.

12:30 – 1:45 PM

Working in Partnership with the Business Community

Lynn Mitchell, Policy Director, Corporate Voices for Working Families

Businesses have a vested interest in supporting community EITC outreach initiatives and helping their employees learn about tax credits they are eligible to receive. Corporate Voices for Working Families has successfully developed EITC outreach partnerships with major business leaders to promote family stability and self-sufficiency. This session will highlight successful strategies for partnering with employers on EITC outreach initiatives. Corporate Voices for Working Families will also make the EITC Toolkit available for the business community. A question and answer session will follow the presentation.

1:45 – 2:00 PM

Break

2:00 – 3:30 PM

Developing Financial Literacy: Federal Deposit Insurance Corporation (FDIC) Money Smart Program

John Meeks, Community Affairs Specialist, FDIC

Mary Dupont, Executive Director, Nehemiah Gateway Community Development Corporation

This session will focus on strategies for helping families to develop an understanding and vision for the future by empowering individuals and families to take financial control of their lives through financial literacy. Topics for discussion include freely available training programs/courses and a targeted discussion of real strategies for bringing these resources into every day practice.

3:30 – 4:00 PM

Next Steps

Glenn Stratton, EITC Project Manager, Virginia Department of Social Services

Carolyn Spohrer, EITC Project Manager, Virginia Community Action Partnership

4:00 PM

Closing Remarks

Carolyn Spohrer, EITC Project Manager, Virginia Community Action Partnership

John Horejsi, Federal Project Officer, Welfare Peer TA Network, Office of Family Assistance, Administration for Children and Families